

## Memorandum

Date: January, 19, 2017

To: Trustees, McKnight Brain Research Foundation (MBRF)

From: J. Lee Dockery, MD, trustee, MBRF

Re: MBRF, Strategic Planning Meeting

April 6, 2017

Constellation Room, 9<sup>th</sup> floor

Hyatt Regency Airport Hotel, Orlando: Florida

8:00 AM—3:00 PM

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Attached are the agenda materials for the MBRF Strategic Planning Meeting scheduled for February 6, 2017, from 8:00 AM—3:00 PM in the Constellation Room, located on the 9<sup>th</sup> floor of the Hyatt Regency Airport Hotel in Orlando, Florida.

Your review and thoughtful deliberations in anticipation of participation in the discussion will be useful in achieving a successful outcome to the meeting.

We are fortunate to have secured the services of Debbie Mason again as a facilitator, who also served as the facilitator for the 2014 strategic planning meeting.

A copy of a brief biographical sketch for Ms. Mason is enclosed for your review.

**Debbie Mason, APR, CPRC, Fellow PRSA  
President-Strategists, Inc.**

As President of Strategists, Inc., Debbie Mason is passionate about guiding organizations to achieve greater effectiveness through training and consultation in governance, development, branding, marketing, public relations, planning, organizational development and research services. Known as a keen strategist and ideator, Debbie works with large-scale community planning projects, as well as individual corporate, government, foundation and nonprofit clients. Debbie is a licensed Psycho-Geometric™ trainer, an authorized partner and certified trainer of the DiSC® assessment tools, Accredited facilitator of Patrick Lenconi's Five Behaviors of A Cohesive Team™ and a BoardSource trained facilitator.

Debbie Mason's 35 years of experience in management of brand, communications, marketing, sales, development, advocacy, and planning spans the sectors of agency, corporate, automotive and healthcare experience at local, regional and national levels prior her transition to the nonprofit sector. Her experience includes creating small business and large corporate brands from the "ground up," to rebranding complex multi-corporate entities.

Prior to establishing her firm Strategists, Inc. in 2002, Debbie was the founder and president of Mason Strategic Communications (MSC), a communications agency founded in 1995. The agency had offices in Fort Lauderdale and Gainesville, Florida and was one of Florida's largest independent agencies, prior to its sale. Before founding MSC, Debbie served as the (first ever) vice president of corporate communications and then as vice president for the office of the chairman for JM Family Enterprises, Inc., one of the nation's largest privately held corporations (ranked in the top 25 by *Forbes*, with \$13 billion in revenue and more than 4,000 employees across the nation.) At JM Family, she rebranded the parent corporation and its more than 20 subsidiary companies, developed and managed the resulting communications (media, community, partner, etc.) for all stakeholders, led the company through significant crisis response situations (largest chemical spill in Florida, congressional hearing, state license revocation challenges and several dozen high profile law suits), while establishing and managing the charitable giving strategy - which preceded the family foundation.

Before joining JM Family Enterprises, Debbie held senior executive positions in the healthcare industry for a decade managing research, strategic planning, branding, marketing, customer service, communications and sales for hospitals and a variety of healthcare systems and holdings in major metro markets across the United States.

Since 1995, she has worked with hundreds of corporate and nonprofit organizations, communities, and coalitions to affect change. Her multi-year work with the Broward Child Welfare Initiative (BCWI) won a prestigious national award, the Silver Anvil, from the Public Relations Society of America in recognition of achievement in strategic public relations planning and implementation. In 2010, Debbie moved back to Gainesville full time and was selected the following year as the President and CEO of United Way of North Central Florida. She held this position she held until late 2014, when she returned to full-time consulting. Prior to that position, she held the position of Chief Marketing and Development Officer for the United Way of Broward County for several years.

Debbie holds numerous professional credentials in public relations and marketing including Certified Public Relations Counselor from the Florida Public Relations Association; Accredited public relations professional from the Universal Accreditation Board; and has been recognized as a Fellow by the Public Relations Society of America (PRSA).

A dedicated servant leader, she has served her national professional association as chair of the PRSA Foundation national board of directors, as chair of PRSA's Nonprofit/Association Section, 2005 International Conference co-chair and as a national governing board member for the 20,000-member society.

Also, she has served as chair and member of dozens of local nonprofit organizations in the various communities in which she has worked and lived. An active Rotarian, Debbie has been a Paul Harris Fellow in three different Rotary chapters in Florida.

As both a volunteer and as a paid strategist, Debbie has lead strategy to pass more than half dozen referendums in communities in which she has lived in Florida, creating Tourist Development Councils, Children's Services Councils and preserving land for parks and recreation. Her past civic engagement also includes managing more than two dozen candidate campaigns across both political parties.

A frequent author for professional and trade journals, Debbie continues her own learning and research in the areas of organizational development and leadership. She is a contributing writer to *Business in the Heart of Florida*, a peer review editor for the *Nonprofit Quarterly* and active in several professional trade associations.

Debbie earned a Bachelor's degree in Public Relations/Journalism from the University of Florida, where she has served as an adjunct professor and twice served as chairman of the Public Relations Advisory Council of the College of Journalism and Communications. She earned a Master's degree in Communications Management from Syracuse University. She is a past graduate of Leadership Florida (the youngest ever inducted), Leadership St. Lucie, Leadership Gainesville, Leadership America and Leadership Monroe.

Debbie enjoys yoga, painting and spending time with friends and her goofy poodle, Tucker, aka "Mr. Poodlicious." A native Floridian from a family of more than seven generations, Debbie tells folks that she enjoys traveling -- as a vagabond explorer she has visited more than 50 countries -- and she is enjoying her newest adventure exploring Northern California since her move there in late 2016.

**McKnight Brain Research Foundation  
Strategic Planning Session Agenda  
Hyatt Regency Orlando International Airport  
9300 Jeff Fuqua Blvd.  
Constellation Room, 9<sup>th</sup> Floor  
Orlando, FL  
February 6, 2017  
8:00 A M-3:00 PM**

1. Welcome Dr. Lee Dockery
2. Review of the Minutes October 14, 2014
3. Overview of Strategic Planning Session Debbie Mason
4. Trustee Survey – Review Results
5. Current Plan – Element Review
  - Discussion
6. Future Directions
  - A. Spending policy
  - B. Institutes – existing and new
  - C. Partners – existing and new
  - D. Public initiatives
  - E. Monitoring
  - F. Board support needed
  - G. Staff support needed
7. Next Steps
8. Adjourn Dr. Lee Dockery

**MINUTES**  
**MCKNIGHT BRAIN RESEARCH FOUNDATION**  
**BOARD OF TRUSTEES MEETING**  
**October 14, 2014**

The strategic planning session of the Trustee's meeting of the McKnight Brain Research Foundation (MBRF) was called to order at 8:15 a.m. on October 14, 2014 in Miami, Florida in the board room of the law office of Mr. Henry H. Raattama, Jr. (See Agenda – Attachment 1)

The following members were present:

Dr. J. Lee Dockery, Trustee  
Dr. Michael Dockery, Trustee  
Dr. Nina Ellenbogen Raim, Trustee  
Dr. Gene G. Ryerson, Trustee  
Dr. Robert Wah, Trustee  
Ms. Melanie Cianciotto, Corporate Trustee

SunTrust Bank Institutional Investment Solutions

Others attending:

Mr. Henry H. Raattama, Jr., Legal Counsel  
Ms. Debbie Mason, President, Strategists, Inc.

**1. Strategic Planning**

As part of their ongoing strategic planning, the trustees reviewed their current strategic plan (Attachment 2) with the assistance of Ms. Debbie Mason, president of Strategists, Inc., as a facilitator. The trustees reviewed the vision and mission statements of the MBRF and revised the goals and strategies previously agreed upon during the November 2012 strategic planning. Ms. Cianciotto will update the strategic plan to reflect the agreed upon changes.

**Action Item 1: Ms. Cianciotto will update all of the components of the strategic plan (Attachment 2) to reflect the agreed upon changes and strategies for implementation.**

The trustees took the additional following actions relevant to components of discussion during the strategic planning meeting:

**2. Continuation of the MBRF**

**Action Item 2: The trustees voted unanimously to continue to maintain the McKnight Brain Research Foundation as an entity and to continue to execute the vision and mission of the Foundation in accordance with the strategic plan.**

### **3. Board Composition and Governance**

#### **A. Number of Trustees**

**Action Item 3: The trustees voted unanimously to amend the Foundation documents to allow for up to seven (7) individual trustees.**

#### **B. Officers of the Board**

**Action Item 4: The trustees voted to abolish the consensus form of board governance and to establish a Board Chair, Vice Chair and Secretary position. Dr. Wah nominated Dr. Lee Dockery for Board Chair, Dr. Michael Dockery for Vice Chair and Ms. Cianciotto, Corporate Trustee to serve as the Secretary. Dr. Ryerson seconded the nominations, Dr. Lee Dockery abstained from voting and all the other trustees voted yes.**

#### **C. Process for becoming an officer**

**Action Item 5: The trustees agreed upon the following criteria to become an officer of the MBRF.**

- 1. Two years of active service as a trustee member are required before to becoming an officer.**
- 2. An individual eligible to serve as an officer may be nominated by another trustee or self-nominate.**
- 3. The term of office coincides with fiscal year.**
- 4. The term of the office of chair is two years, but number of terms not limited.**

#### **D. Duties of Board Members and Officers**

**Action Item 6: The trustees agreed it is necessary to develop a template of duties and responsibilities for board members and officers relevant to the service with the McKnight Brain Research Foundation. Sample templates with modification applicable to the MBRF will be discussed at the February 2015, meeting of the trustees.**

### **4. Spending Policy**

**Action Item 7: The trustees approved the following guidelines for the development of a spending policy which manage and preserve the assets of the Foundation to enable it to be successful in meeting its Mission and Purpose.**

- A. Preserve the corpus for future efforts**
- B. Spend at least the minimum requirement by the Internal Revenue Service of 5% annually.**
- C. Search for worthy opportunities to grant beyond the 5% minimum requirement**
- D. Be receptive to unsolicited opportunities which may be submitted to the Foundation for consideration.**
- E. Periodically evaluate the purchasing power of the portfolio with multiple factors involved weighted against the attributes of opportunities.**
- F. Perform scenarios of cost, payout and return for instituting new programs above minimum commitments such as additional institutes, mega grants (NIA), request for proposals, clinical research fellowships, and compendia of research.**

#### **5. Amendment to Trust Agreement**

**Action Item 8: The trustees voted unanimously to:**

- A. Amend the paragraph describing the Purpose of the Trust document to include the phrase, "principally intended", consistent with the description of the Purpose in the Gift agreements.**
- B. Amend the Foundation documents to allow for up to seven (7) individual trustees with staggered three year terms with eligibility for two terms with a renewal at the option of the trustees.**

#### **6. Unfinished Business**

**Action Item 9: The trustees agreed to finalize the description of duties of the trustees and officers of the Board in addition to the administrative structure of the operation of the Foundation with regard to staffing, web site management, press releases and public relations at future meetings.**

#### **Summary of Action Items:**

**Action Item 1: Ms. Cianciotto will update all of the components of the strategic plan (Attachment 2) to reflect the agreed upon changes and strategies for implementation.**

**Action Item 2: The trustees voted unanimously to continue to maintain the McKnight Brain Research Foundation as an entity and to continue to execute the vision and mission of the Foundation in accordance with the strategic plan.**

**Action Item 3: The trustees voted unanimously to amend the Foundation documents to allow for up to seven (7) individual trustees.**

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**Action Item 8: The trustees voted unanimously to:**

- A. Amend the paragraph describing the Purpose of the Trust document to include the phrase, "principally intended", consistent with the description of the Purpose in the Gift agreements.**

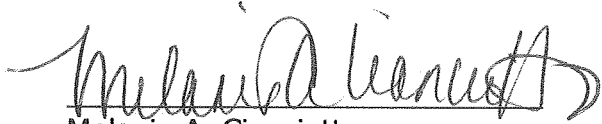


**B. Amend the Foundation documents to allow for up to seven (7) individual trustees with staggered three year terms with eligibility for two terms with a renewal at the option of the trustees.**

**Action Item 9: The trustees agreed to finalize the description of duties of the trustees and officers of the Board in addition to the administrative structure of the operation of the Foundation with regard to staffing, web site management, press releases and public relations at future meetings.**

There being no further business, the meeting was adjourned at 3:15 p.m.

Respectfully Submitted,

A handwritten signature in dark ink, appearing to read "Melanie A. Cianciotto", with a stylized flourish at the end.

Melanie A. Cianciotto  
SunTrust Bank, Corporate Trustee

## McKnight Brain Research Foundation

### 1. Please answer the following in preparation for our planning session:

#### 1. How long have you been a board of trustee member of the McKnight Brain Research Foundation (MBRF)?

- ☐ Less than one year
- ☐ 1 to 3 years
- ☐ 4 to 7 years
- ☐ More than 7 years

#### 2. What motivated you to become a trustee? (Please choose only one response that was your PRIMARY motivation.)

- ☐ Representing my company/organization as requested
- ☐ Passionate about the mission
- ☐ Supports what I do professionally
- ☐ Friend or colleague asked me
- ☐ Original Founding Board member
- ☐ Other (please specify)

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## McKnight Brain Research Foundation

### 2. Board Opinions

3. Please write the short description you use to explain the MBRF when someone asks about it?

4. Please rate your level of agreement with the following statement:

	Strongly disagree	Disagree	Neutral	Agree	Strongly agree
The responsibilities of serving on this board are clearly communicated to board members.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

5. In reviewing the Board of Trustees' COLLECTIVE performance, please rate the effectiveness of the ENTIRE board in meeting the following board duties:

	Very low	Low	Moderate	High	Very High
Board/management relationship	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Financial oversight	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Policy oversight	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Anticipating issues	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Advocacy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Strategic planning	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Grant oversight	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

McKnight Brain Research Foundation

**4. Looking forward**

**12. Given those future scenarios, as we look to add board members, what specific skills and attributes are missing from the board currently?**

**13. What major goals for the next 12 months should the BOARD accomplish?**

**14. Should the MBRF consider soliciting grant proposals in the future?**

☐ Yes

☐ No

Comments

**15. What "staff functions" or other support might be needed from the corporate trustee to reach those goals?**

**16. What is the most important topic that should be discussed at the strategic planning session in your opinion?**



# McKnight Brain Research Foundation

## Strategic Plan



## McKnight Brain Research Foundation Vision Statement:

***To:***

***“Improve the quality of life through the understanding and alleviation of age related memory loss.”***

*Approved October 18, 2006*

*Reaffirmed November 1, 2012*

*Reaffirmed October 14, 2014*



## **McKnight Brain Research Foundation**

### **McKnight Brain Research Foundation Value Statement:**

- Commitment**

- The MBRF is committed to its vision to understand and alleviate age-related memory loss, and expects the same of its grant recipients and research partners*

- Discovery**

- The MBRF values scientific curiosity and discovery leading to clinical intervention in age related memory loss*

- Honesty/Integrity**

- The McKnight Brain Research Foundation (MBRF) conducts its affairs with the highest degree of honesty, integrity, and accountability and expects the same of others*

*Approved October 18, 2006  
Reaffirmed November 1, 2012*



## **McKnight Brain Research Foundation Mission Statement**

- **Lead** in generating interest and support of scientific research to understand and alleviate age-related memory loss
- **Inspire** commitment and shared vision in the understanding and alleviation of age-related memory loss
- **Nurture** scientists dedicated to the exploration of innovative research initiatives intended for clinical application in age-related memory loss
- **Promote** collaboration and communication among research scientists, institutions, and organizations engaged in research in age-related memory loss
- **Partner** with research scientists, institutions, and organizations to promote research to understand and alleviate age-related memory loss
- **Recognize and Reward** significant achievement in discoveries leading to clinical intervention to understand and alleviate age-related memory loss

Approved December 11, 2006

Reaffirmed November 1, 2012

Amended October 14, 2014





## Mission, Goal, Strategy Planning

### Mission Statement

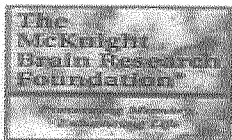
- Lead in generating interest and support of scientific research to understand and alleviate age-related memory loss

### Goal

- Increase the number of institutions, researchers, organizations and scientists whose focus is to understand and alleviate age-related memory loss
- Explore new avenues of potential research within the scientific community which could lead to the development of therapeutic and behavioral interventions and, ultimately, to improved outcomes for cognitive aging
- Raise the level of awareness both within the scientific community and among the public about the importance of research in cognitive aging and its tremendous value to society

### Strategies

- Grant/Gift agreements
- FNIH/NIA/MBRF Summit
- Website, media, communications
- Seminars, symposia, colloquia
- Inter-Institutional Meeting
- Leadership Council
- Travel Award Program
- IOM Study
- Assess the status of the current scientific knowledge in the normal aging and changes in cognition associated with the aging process
- Identify research scientists whose research focus is compatible with the MBRF vision
- Citations in publications and presentations
- Research Partnership (NIA)
- Inter-disciplinary cores



## Mission, Goal, Strategy Planning

### Mission Statement

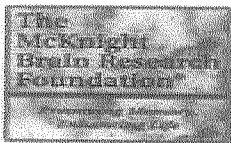
- Lead in generating interest and support of scientific research to understand and alleviate age-related memory loss

### Goal

- Identify cross-disciplinary research emphasizing practical approaches to the development of therapeutic and lifestyle interventions designed to facilitate cognitive trajectories in the aging population
- Assure the progress towards the vision and goals of the Foundation is achieved

### Strategies

- Grant/Gift agreements
- FNIH/NIA/MBRF Summit
- Website, media, communications
- Seminars, symposia, colloquia
- Inter-Institutional Meeting
- Leadership Council
- Travel Award Program
- IOM Study
- Assess the status of the current scientific knowledge in the normal aging and changes in cognition associated with the aging process
- Identify research scientists whose research focus is compatible with the MBRF vision
- Citations in publications and presentations
- Research Partnerships (NIA)
- Inter-disciplinary cores



## Mission, Goal, Strategy Planning

### Mission Statement

- Inspire commitment and shared vision in the understanding and alleviation of age related memory loss

### Goal

- Educate and raise the level of awareness in the scientific community about the importance of research in cognitive aging and age-related memory loss and its tremendous value to society
- Encourage the increase in the number of institutions, scientists, researchers, organizations that share the vision
- Foster an environment that would enhance the interest and focus on the recruitment of highly talented individuals into the field
- Educate and raise the level of awareness among the public about the importance of research in cognitive aging and age related memory loss, the impact on their lifestyle and families.
- Attract and cultivate partners to leverage awareness, education and funding of age-related memory loss.

### Strategies

- Grant/Gift agreements
- Increase the number of graduate and post-doctoral students in the field
- MBRF hosted Society for Neuroscience Poster Session
- Website, media, communications
- Seminars, symposia, colloquia, etc.
- Targeted awards, for both new investigators and students
- National spokesperson
- IOM study
- NIA Partnership
- Targeted outreach to potential partners (public and private foundations, etc.)



## Mission, Goal, Strategy Planning

### Mission Statement

- Promote collaboration and communication among research scientists, institutions, and organizations engaged in research in age-related memory loss

### Goal

- Increase collective understanding and knowledge of the process of learning and age-related memory loss
- Sharing of the information and research in age-related memory loss
- Accelerate discoveries leading to the understanding and alleviation of age related memory loss

### Strategies

- Requirements in Grant/Gift agreements to collaborate
- FNIH/NIA/MBRF Summit
- Website, media, communications
- Scientific Publications
- Seminars, symposia, colloquia
- Inter-Institutional Meeting
- Leadership Council
- Focus groups
- Travel Award Program
- IOM Study
- MBRF hosted Society for Neuroscience Poster Session
- Site visits
- Recognition and rewards
- Establishing Brain Institutes committed to the vision of MBRF
- Research Partnerships



## Mission, Goal, Strategy Planning

### Mission Statement

- Nurture scientists dedicated to exploration and innovative research initiatives intended for clinical application in age-related memory loss

### Goal

- Encourage, maintain, support scientists whose focus is to understand and alleviate age-related memory loss
- Foster innovation
- Expand the number of research scientists whose focus is to understand and alleviate age-related memory loss
- Therapeutic intervention of age-related memory loss

### Strategies

- Ensuring that the institution fosters an environment conducive to the success of the research scientist
- Seed grants directed toward innovation
- New investigator awards
- Travel Award Program
- Track all post-doctoral students in programs or institutions that have received MBRF funding
- Increase the number of graduate and post-doctoral students in the field
- MBRF hosted Society for Neuroscience Poster Session



## Mission, Goal, Strategy Planning

### Mission Statement

- Partner with research scientists, institutions, and organizations to promote research to understand and alleviate age-related memory loss

### Goal

- Leverage the financial and intellectual resources of the Foundation
- Raise the level of awareness of the understanding and alleviation of age-related memory loss
- Promote cooperation and collaboration within the scientific community
- Through partnerships, explore new avenues of potential research within the scientific community which could lead to the development of therapeutic, behavioral and life style interventions to improve outcomes for the aging
- Attract and cultivate partners to leverage awareness, education and funding of age-related memory loss.

### Strategies

- FNIH/NIA/MBRF Summit
- Seminars, symposia, colloquia
- Establish McKnight Brain Institutes
- Grant/Gift agreements
- Research Partnership with NIA and FNIH
- Partner with other national organizations
- Match funding with MBRF
- Targeted outreach to potential partners
- Inter-Institutional Meetings



## Mission, Goal, Strategy Planning

### Mission Statement

- Recognize and Reward significant achievement in discoveries leading to clinical intervention to understand and alleviate age-related memory loss

### Goal

- Provide Incentive and encouragement
- Increase awareness
- Focus the outcome on clinical applications
- Expand the number of research scientists whose focus is to understand and alleviate age-related memory loss
- Reward and retain existing talent within the field
- Recognition

### Strategies

- Research prize awards
- Young investigator awards
- Seed grants
- New investigator awards
- Develop relationships with other institutions and organizations to increase awareness
- Individual communication
- Public Communication
- MBRF hosted Society for Neuroscience Poster Session

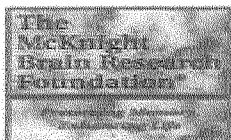


## Guidelines for funding

- Receptivity
- Matching funds
- Reputation
- Impact
- Innovation
- Opportunity for synergy
- Monitoring requirements
- Potential for success
- Physical and human resources (facilities and manpower)
- Honesty, integrity and commitment to transparency and accountability

*Approved November 1, 2012  
Amended October 14, 2014*





## **McKnight Brain Research Foundation Mission Statement**

- **Lead** in generating interest and support of scientific research to understand and alleviate age-related memory loss
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